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FinancialPlanning

# Wealthtech Weekly

September 4, 2025

**By Rob Burgess**
Reporter

My bags are (mostly) packed for Future Proof in Huntington Beach, California. I spoke with Matt Middleton, CEO and founder, for this Q&A on the evolution of the event, how he picks the musical acts and more.

I'll be hosting a panel, "From Values to Value: Personalization Without the Politics," from 9:35 to 10:05 a.m. PST Wednesday on the Ocean Stage, with panelists Doug Scott, CEO and co-founder of Ethic, and Cameron Rogers, partner at Angeles Wealth Management. Will I see you there? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

**Connect with Rob:**

TOP STORIES

INDUSTRY NEWS

# Matt Middleton on future proofing Future Proof

Now in its fourth year, the annual beachside conference is bigger than ever, with satellite events planned throughout the year.

- **Avoiding the pitfalls of windfalls, from lotteries to inheritance**
  Winning the Powerball jackpot may be unlikely, but clients experience unexpected windfalls every day.
- **When AI goes wrong in wealth management**
  Artificial intelligence tools are everywhere in the wealth management industry, with providers promising increased efficiency and time savings. Things don't always go as planned, though.

- **Liquid assets? How fine wine can age well as an investment**
  Rare bottles can go for several times the original price, but time, due diligence and proper storage are required to maintain these special alternative investments.
- **Posthumous AI avatars are here. Estate planning needs to adjust**
  It may sound like science fiction, but experts say estate planners should help clients decide now how their likeness should, or should not, live on after their death.

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## Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

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